



Using the Add/Edit Family Tool



Adding or updating the Address, Email or landline phone:

1. Click **Contacts** and locate one member of the family.
2. Click the **Tools** button and choose the **Add/Edit Family** tool.
3. Update the address.

Adding new family members to an existing family

1. Open the contact record for any member of the family and click the **Tools** button
2. Choose **Add/Edit Family**
3. Click the **Add New Family Member** link at the bottom of the screen.
4. Complete as much information as is available for the new family member.
5. Click **Save** and **Close**.

Adding a Family – Decision flowchart

1. Are you adding this person or family because they have registered as new parishioners?
 - a. **Yes.** Follow the **Looking for a Family** instructions at the bottom of this page to see if they exist. If they do exist, follow the instructions on page 2.
 - b. **No** refer to question #2.
2. Are you adding this person or family because they are enrolling in your **Religious Education** program, receiving a **sacrament** through your parish or their **children are enrolled in your school**?
 - a. **No.** Refer to question #3.
 - b. **Yes.** Does the family exist in MP already? Follow the **Looking for a Family** instructions at the bottom of this page to see if they exist.
 1. **Yes:** Open your group and add the child to the appropriate group. To learn how to add someone to your group, refer to <https://www.eriercd.org/mpt2.html>.
 2. **No:** Follow the steps on page 2 to add the family then return and complete steps 2a-c.
 - **Religious Ed:**
 - Add the child to the appropriate group. To learn how to add someone to your group, refer to <https://www.eriercd.org/mpt2.html>.
 - Edit the **Participant Type = Formation Family – Non member.**
 - **School:** Edit the **Participant Type = School Family.**
 - **Sacrament:** Add the child to the appropriate group. To learn how to add someone to your group, refer to <https://www.eriercd.org/mpt2.html>.

3. Are you adding this person or family because they are joining a miscellaneous group (like bible study)
 - a. **Yes.** Does the family exist in MP already? Follow the **Looking for a Family** instructions at the bottom of this page to see if they exist.
 1. **Yes, do exist:** Open your group and add the person to the appropriate group. To learn how to add someone to your group, refer to <https://www.eriecd.org/mpt2.html>.
 2. **No, they do not exist:** Follow the steps on page 2 to add the family then return and complete steps 2a and 2b.
 - a. Add the person to your group.
 - b. Edit the **Participant Record** so the **Participant type = Guest**

Looking for a Family

1. Click **Contacts** and then click the **Tools** button.
2. Choose **Add/Edit family** tool.
3. Click in the **Search** field and type your search like this **Last Name, First name**. Example: Doe, John.

Adding a parishioner to your congregation

1. Does the Family Exist in MP?
 - a. **Yes:**
 - a. Change the **Congregation** to yours. Their former parish will receive notification the parishioner has registered elsewhere.
 - b. Double check the rest of the information for each of the members editing the text where needed and using the **Add new Family Member** button to add additional members.
 - c. Click **Save** and **Close** and continue to the instructions under the heading **Assigning an envelope number and salutations.**
 - b. **No.** Click the **New Family** button and continue to step 2.
2. Enter address information at the top of the screen.
3. Enter information pertaining to each person – completing as many fields as you are able.
 - a. Click the **More** button to reveal all of the fields. (Shown below in the **Less** format)
 - b. Usually, for couples, the male would be HOH1.
 - c. Be sure to check the **Heads are married** field for married couples.
4. Check the box to create a **Donor** record. Usually, you would click that box for the male Head of Household unless he is not Catholic. You only need one Donor record unless HOH's are giving separately.
5. If there are children or other adults living in the household, use the Family Member 3 and 4 sections and click the Add New Family Member button for additional persons.

Note If other adult donors are living in the same household, it would be best for them to be set up in a separate family record even if the address is the same.


6. Click **Save** and **Close**.
7. Click **Families**.
8. Search for the new family and click to open the family record

9. Click the **Edit Record** button and enter a **Registration Date** for the family.
10. Click the **Save** button.

Assigning an envelope number and salutations. The envelope number is usually assigned on the husband's record. These instructions assume you are adding a married couple. If the head of household is a single woman, you would follow these instructions for her instead of the husband.

11. Click on this view: <https://my.eriercd.org/mp/299-1405> and make note of the next available envelope number or scroll down to see where there may be gaps and use one of those numbers.
12. Click **Contacts** and search for the husband and click to open his contact record.
13. Set his **Contact Status** to **Active**. (If he is not Catholic and if he doesn't wish to receive correspondence from the church, you can set him to Inactive.)
14. Click the **Edit** button and add an appropriate salutation in the **Legacy Salutation** field. You'll be setting up the primary contact's salutation here and the spouse (if there is one) later in these instructions.
 - a. Examples for a married couple BOTH would be: Mr. and Mrs. Doe
 - b. Examples for a single male: Mr. Doe, Dr. Doe, Reverend Doe
 - c. Examples for a single female: Ms. Doe, Miss Doe, Mrs. Doe, Dr. Doe.
15. Click the **Save** button
16. Scroll down to the heading **Donor Record** and click the blue jump (chain) link
17. Click the **Edit** button and enter an envelope number in the **Envelope No** field.
18. Click the **Save** button
19. Under the **Contact** heading, click the blue jump link.
20. Click the **Primary Family** link across the top of the page and click on the wife.
21. Scroll to the **Legacy Salutation** field and enter an appropriate salutation using the examples in yellow above.
22. Set her **Contact Status** to **Active**. (If she is not Catholic and doesn't wish to receive correspondence from the church, you can set her to Inactive.)
23. Click the **blue link** next to the **Family record**, click **Edit Record** and enter today's date as the **Registration Date**.

Entering any Sacraments for which you have information.

24. Click **Participants** and find the person.
25. Click the **Edit** button. 
26. Scroll down to **the Sacrament Information** section and enter any information you have.
27. Click the blue link for **Milestones**
28. Click the gray **New Milestone Assig** button.
29. Under the Milestone heading, click the downward pointing triangle & choose the sacrament.
30. Under the Program heading, start typing the word Sacrament and then click the downward pointing triangle to choose your parish from the list.
31. Complete as much of the information as possible. If the sacrament didn't happen at your parish, select the **At Prior Church = Yes** option.
32. Click **Save** and repeat steps 19-25 for additional Sacraments.